

URBAN/MUNICIPAL

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1988

1988 — ANNUAL REPORT

URBAN MUNICIPAL
SEP 8 - 1992
GOV 'MENT DOCUMENTS

UNITED WAY OF BURLINGTON, HAMILTON-WENTWORTH



1988/89 BOARD OF DIRECTORS

President	John Buschhausen
Vice-Presidents	
Administration, Acting President	Richard Francescutti
Agency Relations	Ron Franceschini
Fund Raising	Norm Lockington
Labour	Bill Fuller
Marketing	Ross Robinson
Treasurer	Richard Francescutti
Secretary	Peter Tice

Board Members

Bryan Adamczyk
Jim Arsenault
William Bain
Councillor Robert Brechin
Richard Capling
Stan Carey
Ursula Chotzen*
Alderman Geraldine Copps
Renate Davidson
Pat Dillon
Bruce Garand
Lydia Goshgarian

Gary Hysop
Judith Johnson
Councillor Bill Lawrence
Michael Meyer
Alderman Don Ross
Councillor Grant Shaw
Urmaz Soomet
Marnie Spears
Bob Sutton
Mayor Robert Wade
David Wilson
Josie Zurini**

* Resigned during term ** Appointed during term

Board Consultants

Joan Berta

Mike Pennock

UNITED WAY STAFF

Administration

Bruce Mochrie, Executive Director
Marilyn Lupton, Administrative Assistant
Florence Arsenault, Receptionist
Joan Haxton, Part-time Clerk Typist

Agency Relations

Sharon Monte, Director
Lou Remillard, Assistant
Catherine Sindall, Assistant
Anne Gaunt, Secretary

Campaign

Diana Borowski, Director
Julie Brown, Associate
Melissa Devenny-Redman, Associate
Janet McKenzie, Associate
Sharon Snaith, Associate
Brenda Craig, Secretary

Finance & Administration

Norman Lloyd, Director
Terri Buordolone, Accounting Administrator
Filomena DiCarlo, EDP Clerk Typist

Labour/Community Services

Bryan Rushton, Director
Lisa Carboneau, Secretary

Marketing

Kim Worobel, Director
Janice White, Assistant
Lisa Carboneau, Secretary

Volunteer Leadership Development

Sheelah Dunn Dooley, Director
Marilyn Lupton, Administrative Assistant

TOGETHER WE MADE IT HAPPEN

This has been a year of many successes. For the fourth consecutive year, our annual Campaign achieved its goal. For 1988/89, this meant there will be \$6,575,000 to help "maximize the community's response to human care needs".

We are proud of this achievement and it would not have been possible without the dedication of thousands of volunteers and the generosity of the citizens and corporations in Burlington, Hamilton-Wentworth.

In 1988, United Way funds were used to help support agencies who provided more than one hundred and fifty vital community services. It is estimated that they touch the lives of one in four of our community's citizens. This is a remarkable accomplishment. The agencies who provide these services are to be commended for their efforts to improve the quality of life in our community.

These are exciting and challenging times. Those of us who are involved in fund raising and social service environments are well aware of the increased fund raising activities and the growing demand for human care services. At the United Way we are preparing to meet the challenges of the future. Our past successes have made us a financially stable, vital, community organization and this is the foundation upon which we will build for the future.

A major undertaking in 1988/89 was the development of a strategic planning process. We initiated this process by reviewing our history, assessing our own operations and reviewing community trends and needs. In 1989 we will develop strategies to capitalize on our strengths and overcome our weaknesses.

In response to the world around us, we are becoming a more outward looking organization. We have developed our capacity to listen and respond to the com-

munity through the use of market research. We are taking a more active role in co-ordinating our efforts with other funders.

We also took a leadership role by establishing a task force to address the issue of privatization in social services delivery, in co-operation with the Hamilton & District Labour Council. This will help the United Way, labour and our funded agencies to deal with the issue when, and if, it should arise.

Thanks to the generosity of the late Kazys Vaitkunas, this past year also saw some long overdue improvements to the United Way. The installation of new work stations and a new meeting room have provided volunteers and staff with a more efficient and comfortable working environment.

None of our accomplishments would have been possible without the dedication and skills of our donors, volunteers and staff. To all of you, we express our heart-felt appreciation and our confidence in the continued success of our United Way.

John Buschhausen
President

Bruce Mochrie
Executive Director

ORGANIZATIONAL HIGHLIGHTS

STRATEGIC PLANNING

John Buschhausen, President

This year, the Strategic Planning process swung into high gear! We began by conducting an organizational assessment. This assessment involved questionnaires to staff, key volunteers and funded agencies. We conducted interviews with community leaders regarding their views on United Way operations. The Hamilton and Halton Social Planning Councils provided valuable information on important community needs and Government directions with regard to human care services.

This information is being used to determine critical issues facing our United Way and to develop a strategic plan in 1989.

AGENCY RELATIONS

Jim Arsenault, Chairman

All agencies funded by United Way are unique -their financial needs vary and they provide many different services. Each is deserving of our support so it requires considerable effort to allocate funds in a manner that is fair and equitable.

In 1988/89 the United Way allocated \$5,159,541 to community agencies. In this same time period, over 100 community volunteers spent more than 4,000 hours to make recommendations regarding the allocation of 1989/90 funds. Their recommendations resulted in the approval of allocations to 69 agencies in the amount of \$6,452,002. These funds will be used to maintain and expand currently funded services, provide for the special needs of member agencies and provide for new services and agencies through the Demonstration & Development Fund.

The community's needs are constantly changing and growing. This presents United Way with the challenge to meet new and emerging needs while continuing to maintain existing services. One of the ways we are meeting this challenge is through the development of an annual allocations plan which includes setting funding priorities. This will enable us to plan for a healthy future for both the community and the United Way.

CAMPAIGN

Gary Hysop, Chairman

We are proud to announce that the 1988 fund raising goal of \$6,575,000 was achieved! It took over a year

of diligent planning and the dedication of thousands of volunteers.

The year began when the Campaign Cabinet conducted a detailed analysis of previous campaigns. They then developed a sound, strategic plan to ensure success. This plan was presented to key volunteers and staff in June, and, campaign volunteers began implementation immediately.

The Loaned Representative Program was revised and 16 key people from business, labour, Government, and non-profit organizations were recruited to assist United Way on a full-time basis. Their salaries and expenses were totally covered by their employers. These individuals not only provided a valuable contribution to the Campaign but also benefited by developing their professional skills.

The 1988 Campaign was a difficult one. We needed to raise \$360,000 new dollars. The success is attributed to the support of businesses, labour, employees and individual donors who once again came through to meet the needs of this community.

FINANCE AND ADMINISTRATION

Richard Francescutti, Treasurer

It is the responsibility of the Finance & Administration Committee to monitor and control the overall financial operations of our United Way. The Committee meets regularly to review income from donations and pledges as well as all United Way expenditures. The Finance & Administration Committee works to manage our own spending to ensure that sufficient resources are made available to conduct an effective annual campaign as well as maintain the ongoing year-round operation of the organization. At the same time, we insure against "rainy days" by closely monitoring the Reserves so that in the event of a substantial shortfall in the annual campaign revenue, so possible in these days of economic uncertainty; the agencies and the community we serve will not suffer by allocation reductions.

We are pleased to report that for the year 1988/89, these objectives were met.

Through the generosity of an estate bequest, and at no cost to donors, the United Way's office premises were upgraded substantially with modular furnishings and new carpeting.

The financial health of our United Way is excellent and the Finance & Administration Committee's continuing challenge will be to not only maintain that progress but to strengthen it in future years.

LABOUR/COMMUNITY SERVICES

Bryan Adamczyk, Chairman

The Labour/Community Services Committee continued to maintain and enhance the partnership between organized labour and the United Way.

Volunteers from labour not only made significant contributions to the 1988 Campaign, but were also heavily involved in organizing the Campaign.

The Union Counsellor Program, taking on a new format, trained 20 Union members over 15 sessions. These members are now able to answer questions in the workplace regarding the availability of health and social services.

The Labour/Community Services Committee established a Task Force to address the issue of privatization. Although there were no immediate concerns, a report was issued outlining guidelines and a process to deal with issues if the need arises. Once this report was approved by the Hamilton & District Labour Council and United Way, a forum for funded agencies was held to present the report and discuss possible implications.

MARKETING

Ross Robinson, Chairman

United Way marketing strategies were developed and successfully implemented in line with organizational objectives.

For the second year, a public attitude survey was conducted. The results of this study were utilized to determine the focus of our public education program. Throughout the year, our local media was instrumental in helping to tell the complex United Way story.

After 13 months of detailed analysis and planning, a recognition Policy was developed. This policy outlines specific recognition practices for all United Way constituents. In addition, it details timing and responsibility. This policy was unanimously accepted by the Board of Directors.

United Way and its funded agencies worked together to develop joint promotion plans. In addition, through United Way, the agencies ran a well attended, successful workshop to develop guidelines on giving effective tours and speeches.

VOLUNTEER LEADERSHIP DEVELOPMENT

Stan Carey, Chairman

The Volunteer Leadership Development (VLD) program significantly expanded in 1988 to provide development opportunities for Board members of voluntary agencies. Over 500 participants attended workshops on such matters as Organizing and Governing, Planning and Goal Setting, Fund Raising, Program Evaluation and Leadership.

In addition to assisting voluntary agencies, 34 volunteer trainers have significantly assisted other United Ways establish a Volunteer Leadership Development program in their community.

Once again, VLD had the opportunity to provide the training for the "Young Leaders of Tomorrow Program", sponsored by the Hamilton Voluntary Action Centre. Over 30 young people between the ages of 16 and 24 were involved in this program for one year.

VLD organized a four day training session on Executive Leadership (a United Way/Centraide Canada program) held in Hamilton for 22 senior managers from United Way and area agencies.

We conducted a major marketing project that surveyed clients of the Volunteer Leadership Development services. This information will help us refine current programs and identify new opportunities for growth.

Plans for 1989 include refinement of current programs and development of new initiatives which will enhance managerial effectiveness in non-profit agencies.

**HAMILTON AND DISTRICT UNITED APPEAL
OPERATING FUND
STATEMENT OF FINANCIAL ACTIVITIES AND SURPLUS
YEAR ENDED MARCH 31, 1989**

	<u>1988/89</u> <u>(12 months)</u>	<u>1987/88</u> <u>(15 months)</u>
SUPPORT FROM THE GENERAL PUBLIC		
Allowance from pledge losses	\$6,303,135	\$7,307,798
	<u>287,049</u>	<u>227,706</u>
Funds available for allocation	<u>6,016,086</u>	<u>7,080,092</u>
 ALLOCATIONS AND EXPENSES		
Allocations to agencies (Schedule 1)	<u>5,159,541</u>	<u>6,002,144</u>
Management and program expenses (Schedule 2)		
Management expenses		
Fund Raising	408,885	450,421
Administration	169,459	195,408
Agency Relations	146,332	174,589
Marketing	<u>142,700</u>	<u>93,046</u>
	<u>867,376</u>	<u>913,464</u>
 Program expenses		
Labour/Community Services	40,230	40,232
Volunteer Leadership Development	<u>31,680</u>	<u>30,484</u>
	<u>71,910</u>	<u>70,716</u>
	<u>939,286</u>	<u>984,180</u>
 Total allocations and expenses	<u>6,098,827</u>	<u>6,986,324</u>
 SURPLUS (DEFICIT) FROM OPERATIONS	<u>(82,741)</u>	<u>93,768</u>
 TRANSFER FROM THE RESERVE FUND	<u>12,520</u>	<u>—</u>
 SURPLUS (DEFICIT), BEGINNING OF YEAR	<u>70,221</u>	<u>(23,547)</u>
 SURPLUS, END OF YEAR	<u>\$ —</u>	<u>\$ 70,221</u>

HAMILTON AND DISTRICT UNITED APPEAL RESERVE FUND BALANCE SHEET

	<u>1988/89</u> <u>(12 months)</u>	<u>1987/88</u> <u>(15 months)</u>
ASSETS		
Cash	\$ 29,535	\$ 16,842
Term deposits and treasury bills	1,300,000	1,180,212
Marketable securities	—	25,000
Interest receivable	25,255	1,346
Due from operating fund	20,941	—
Funds held by the United Ways of Ontario (Note 3)	193,607	125,757
	<u>1,569,338</u>	<u>1,349,157</u>
LIABILITIES		
Due to operating fund	<u>—</u>	<u>45,287</u>
RESERVE FUND BALANCE	<u>\$1,569,338</u>	<u>\$1,303,870</u>

During 1987, the Hamilton and District United Appeal amended its By-laws to change its fiscal year end from December 31 to March 31, to better match the agency's operating cycle.

Accordingly, the comparative figures shown in these financial statements reflect the financial position of the organization for a fifteen-month period from January 1, 1987 to March 31, 1988 and current operations reflect activity for a twelve-month period ended March 31, 1989.

These reports are an abbreviated form of the audited Financial Statement of the Hamilton and District United Appeal (operating as United Way of Burlington, Hamilton-Wentworth) for the period ending March 31, 1989 reported on by our auditors, Deloitte Haskins & Sells, Chartered Accountants, in their report dated May 3, 1989.

Copies of the complete audited financial statements are available for review at the United Way, 177 Rebecca Street, Hamilton, Ontario.

HAMILTON AND DISTRICT UNITED APPEAL SCHEDULE OF ALLOCATIONS TO AGENCIES YEAR ENDED MARCH 31, 1989

ALLOCATIONS TO FUNDED AGENCIES	1988/89 (12 months)	1987/88 (15 months)
Alternatives for Youth	\$ 99,422	\$ 114,253
Amity Goodwill Industries	17,970	—
Burlington Association for Community Living	91,369	95,050
Big Brother Association of Burlington & Hamilton-Wentworth	302,411	360,066
Boy Scouts of Canada - Hamilton-Wentworth District Council	101,858	122,178
Burlington Bereavement Resource Council	17,850	—
Canadian Mental Health Association		
Burlington Branch	16,000	19,802
Hamilton-Wentworth Branch	125,000	151,329
The Catholic Family Services of Hamilton-Wentworth	209,771	248,677
Catholic Youth Organization	148,839	177,808
The Canadian Hearing Society - Hamilton Regional Office	48,103	58,184
Canadian Red Cross Society - Burlington Branch	100,438	141,716
Canadian Red Cross Society - Dundas Branch	32,107	33,802
Canadian Red Cross Society - Hamilton Branch	571,952	699,425
Canadian Red Cross Society - Waterdown & District	15,503	17,575
"COHR" Family Services	29,600	30,676
Community Information Service of Hamilton-Wentworth	57,943	68,199
Community Youth Programs Inc.	4,698	7,589
Canadian National Institute for the Blind		
Hamilton-Wentworth Branch	163,334	180,732
Halton-Peel Branch	27,609	32,868
Dundas Community Services	25,135	28,092
The Elizabeth Fry Society, Hamilton Branch	101,231	122,826
Family Services of Hamilton-Wentworth, Inc.	498,750	587,879
Girl Guides of Canada — Hamilton Area	33,804	35,280
Halton Adolescent Support Services	45,339	51,650
The Halton Alcohol and Drug Addiction Program	7,721	8,151
Halton Family Services	86,265	94,180
Halton Helping Hands	28,848	31,944
Halton Social Planning Council	71,761	87,262
Hamilton East Kiwanis Boys' and Girls' Club	88,365	107,502
Hamilton and District Literacy Council	11,900	14,150
Hamilton Wesley House	—	55,181
Hamilton & District Association for the Mentally Retarded	93,733	70,335
Hamilton Jewish Social Services	58,998	72,284
John Howard Society of Hamilton	106,275	124,700
Multiple Sclerosis Society of Canada — Hamilton District Chapter	60,890	72,425
The Navy League of Canada - Hamilton Branch	26,750	31,932
Nelson Youth Centres	35,120	37,784
Ontario Friends of Schizophrenia — Hamilton Chapter	18,532	—
Ontario Social Development Council	7,300	7,000
Hamilton and District Ostomy Association	6,900	8,124
Parental Stress Services	30,510	37,760
Pastoral Counselling Centre	14,095	—
Sexual Assault Centre	52,726	51,31

ALLOCATIONS TO FUNDED AGENCIES (Continued)

	1988/89 (12 months)	1987/88 (15 months)
Social Planning and Research Council of Hamilton & District	227,554	251,917
The St. John Ambulance Association/Burlington Branch	17,298	22,558
The St. John Ambulance Association/Hamilton Branch	33,850	43,940
St. Joseph's Villa (Senior Citizens' Centre)	30,202	35,035
St. Matthew's House	53,921	63,902
Stroke Recovery Association/Burlington Chapter	2,310	2,381
Tele-Touch (Seniors)	16,564	17,860
United Way of Canada	34,960	55,036
Visiting Homemakers Association Inc., Hamilton-Wentworth	25,000	30,590
Voluntary Action Centre of Hamilton & District	128,049	147,865
Victorian Order of Nurses/Halton Branch	18,762	16,023
Victorian Order of Nurses/Hamilton-Wentworth Branch	25,741	31,802
The Hamilton/Burlington Y.M.C.A.	252,500	353,668
The Hamilton Y.W.C.A./MacNab Street Branch	276,209	275,116
The Hamilton Y.W.C.A./Ottawa Street Branch	192,383	216,290
The Hamilton Y.W.C.A./Pottery Rehabilitation Program	—	30,162
	<u>\$5,028,028</u>	<u>\$5,891,829</u>

ALLOCATIONS FOR DEMONSTRATION & DEVELOPMENT PURPOSES

Bereaved Families of Ontario	\$ 3,000	\$ —
Big Brother Association of Burlington & Hamilton-Wentworth	—	781
Big Sister Association of Hamilton & District	18,000	11,340
Burlington Association for Community Living	10,000	—
Burlington Bereavement Resource Council	—	22,420
Canadian Mental Health Association/Burlington Branch	5,000	3,800
Children's Assessment & Treatment Centre	—	3,000
Epilepsy Hamilton & District Association	10,500	10,080
Halton Sexual Abuse Program	4,000	—
Hamilton & District Multicultural Council	3,000	—
Hamilton AIDS Network for Dialogue & Support	10,000	—
Hamilton Area Teenage Mothers Society	13,000	—
Hamilton Central Boys' & Girls' Club	11,500	—
Hamilton East Kiwanis Boys' & Girls' Club	6,500	6,930
Hamilton Mountain Drop-In & Food Centre	—	4,820
Information Flamborough	1,557	—
Interval House of Hamilton-Wentworth	11,248	—
McQuesten Community Association	—	2,500
Multiple Sclerosis Society of Halton	3,500	—
North End Information Services	2,000	1,000
Ontario Friends of Schizophrenics/Hamilton Chapter	—	8,190
Parc East End Multi-Service Centre (Roxborough Centre)	5,456	8,190
Pastoral Counselling Centre	—	8,820
St. Elizabeth Visiting Nurses Association	8,000	—
Victim Services Unit	3,000	—
Victorian Order of Nurses/Halton Branch	—	7,196
Wesley Urban Ministries	7,500	—
	<u>131,513</u>	<u>110,315</u>
TOTAL ALLOCATIONS	<u>\$5,159,541</u>	<u>\$6,002,144</u>

THE MEANING OF THE UNITED WAY SYMBOL



The United Way symbol is seen everywhere
— but what does it mean?

It is called the helping hand symbol and is used by United Ways around the world.



The rainbow overhead, emerging from the hand to shelter the figure, represents hope for a better tomorrow.



The centre image, based on the universal symbol of mankind, is cradled by the helping hand.
It indicates the United Way cares about all people, everywhere.



The bottom is a helping hand symbolizing United Way's support of services and programs
that in turn support the people in local communities.

The United Way helping hand symbol — a symbol of hope, of service, and of help
to people in our communities.

1988/89 STANDING COMMITTEES

Agency Relations Committee

n Arsenault, Chairman	Linda Mooradian
dith Johnson, Vice-Chairman	Janet Nicholson-Vas
en Bistrovitch	Ray Richardson
William Bourque	Diane Scott
lenn Bond	Ron Shaw
rsula Chotzen	Art Sullivan
onna Danielsen	Peter Tice
net Farley	Bob Vair
on Franceschini	Gloria DeSantis - Consultant
haron Johnny	Elaine Eastman - Consultant
ob Kok	

Marketing Committee

Ross Robinson, Chairman	John Keogh
Ron Coburn, Vice-Chairman	Larry Russell
Peter Boxer	Art Shepherd
Andrew Connor	Brian Torsney
Bill Fuller	Allan Will
Gary Hysop	Josie Zurini

Nominating Committee

Urmas Soomet, Chairman	Marnie Spears
John Buschhausen	David Wilson
Stan Carey	

Appeals Committee

ll Fuller, Chairman	Warren Johnson
en Bistrovitch	Bob Vai
onna Danielsen	

Personnel Committee

Ron Franceschini, Chairman	David Wilson
Bill Fuller	

Campaign Cabinet

ary Hysop, Chairman	Bill Fisher
an Berta, Vice-Chairman	Michel Lecavalier
ya Adamczyk	Ross Robinson
oug Berquist	Van Vizniowski
enate Davidson	Mary Weaver

Strategic Planning Committee

John Buschhausen, Chairman	Norm Lockington
Dick Capling	Michael Meyer
Bill Fuller	Ross Robinson
Richard Francescutti	Mike Pennock
Gary Hysop	Elaine Eastman
Judith Johnson	Doug Berquist - Facilitator

Finance & Administration Committee

Richard Francescutti, Chairman	Ron Franceschini
William Bain	Peter Tice

Volunteer Leadership Development

Stan Carey, Chairman	Judith Johnson
Jocelyn Bennett	Michael Meyer
Boris Chemerys	Sue Ogilvie
Ron Franceschini	Ross Robinson

Fund Raising Committee

orm Lockington, Chairman	John Macnamara
an Berta	Ross Robinson
ary Hysop	Marnie Spears

Labour/Community Services Committee

van Adamczyk, Chairman	Lorraine Haskins
m Atterton	Ron Keenan
an Bressette	Dave Lawrence (Deceased 1988)
l Brown	Wayne Marston
ny DePaulo	Elaine McMurray
t Dillon	Pat Smith
o Evans	Bob Sutton
l Fuller	Pat Sutton
Gibson	Dave Wilson

1988 LOANED REPRESENTATIVES

Jan Bielak, Navistar International Corp.
 Joe Boniface, Onex Packaging Inc.
 James Boyd, Bell Canada
 Jessica Brennan, Canadian Red Cross Society
 Marie Dawson, Procter & Gamble Inc.
 Cecil Elliott, Stelco Steel
 Michael Gagnon, Procter & Gamble Inc.
 Jerry Jerome, Dofasco Inc.
 Michel Lecavalier, Halton Separate School Board
 John Lyons, C.S.W. Heating Products
 Carolyn Marshall, Westinghouse Canada Inc.
 Tom Passafiume, The CUMIS Group Ltd.
 Thomas Redman, City of Hamilton
 Joanne Taylor, Volunteer
 Sarah Wood, Volunteer
 Peter Zafirides, U.S.W.A. 1005



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United Way of Burlington, Hamilton-Wentworth

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